



Discovery. Diversity. Distinction.

INSTRUCTION MANUAL FOR REVIEWERS

IT PURCHASE REVIEW SYSTEM

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Background Information

The Information Technology Purchase Review (ITPR) form and process was created to help purchase requesters make well-informed purchasing decisions for IT products and services, address the University's obligations to comply with existing laws, policies, and standards, and make best use of campus IT resources.

The ITPR form must be completed prior to the purchase or acquisition of any IT-related product or solution, regardless of funding source or total cost. The ITPR form was designed to be dynamic, and the number and types of questions displayed changes based upon specific responses about the purchase, the product/solution and its intended use.

Based upon responses provided in the ITPR form, a more in-depth assessment may be required to address:

- Accessibility
- Information Security and Privacy
- Technology Integration and Support
- Procurement and Contracting

ITPR System

Login Process

First, go to the ITPR Landing Page (figure 1), <http://itpss.fresnostate.edu>. Next, log into the system by clicking the "Sign In" button in the upper right-hand side the webpage. Next, the system will take you to the Campus Logic Services webpage where you will need to enter your campus login and password. Last, you will be taken to the End-User Portal where you can: 1) request a new review, or 2) view the status of an existing request, or 3) print a certificate of completion for any review which has a status of "complete."

Figure 1 – ITPR Landing Page



IT Purchase Review (ITPR)

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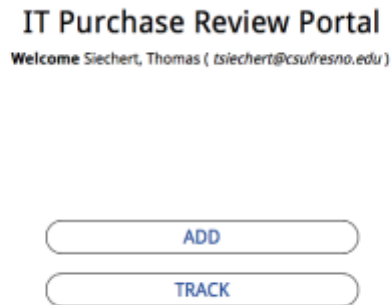
- Accessibility
- Information Security and Privacy
- Technology Integration and Support
- Procurement and Contracting

Main Menu

From the main-menu (figure 2), there are two choices:

- Add (to request a new review)
- Track (to view the status of an existing requests, access/print certificates of completion)

Figure 2 – ITPR Main Menu



Request a new review (“Add” Button)

To begin a new review request, click the “Add” button from the Main Menu. The system will take you to the Qualtrics-based ITPR survey. The survey is dynamic and the number and types of questions asked will vary depending on how you answer various questions.

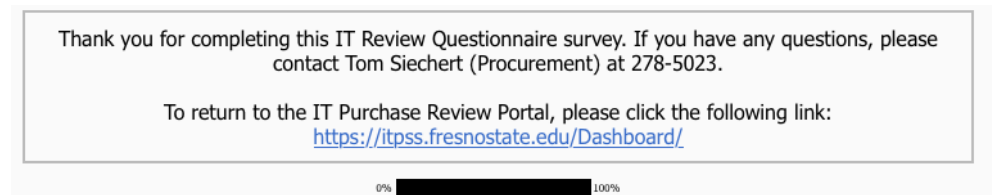
Survey content

The survey includes the following sections:

- General Purchase Information (included for all reviews)
- IT Staff Assistance (included for all reviews)
- Product or Service Description (included for all reviews)
- Accessibility (included if applicable)
- Information Security (included if applicable)
- Integration and Support (included if applicable)

Once you have completed the survey, you will receive a “thank you” message (figure 3), which also includes a link to go back to the Main Menu (End-User “Dashboard”).

Figure 3 - Survey Completed Message



Checking review status (“Review” Button)

You can check the status of any review by clicking the “Review” button from the Main Menu. Depending on how various questions in the survey are answered, a maximum of 5 tasks/reviews may be triggered:

- Generate Quote
- Information Security
- IT Liaison Review (this task was previously known as the “IT Review”)
- Integration & Support
- Accessibility












Status indicators, Not Applicable (**N/A**), In-Progress (), and Complete (), are shown for each possible tasks/reviews (figure 4).

Figure 4 - IT Purchase Review Portal Status Listing

IT Purchase Review Portal								
User: Siechert, Thomas (tsiechert@csufresno.edu) Back to Dashboard								
ITPR #	Description	Status	Submission Date	Generate Quote	Information Security	IT Liaison Review	Integration & Support	Accessibility
9	EXXAT Clinical Software		2016-06-30 10:54:30	N/A			N/A	
17	Max Laptop		2016-07-07 15:06:07		N/A		N/A	N/A

Certificate of Completion

Once a review has been fully completed, the status indicator shown in the Status column (figure 4) will change to Complete (). To access the Certificate of Completion for any review, click the () icon and the system will display a webpage which shows various details of the review.

The Certificate of Completion page can then be printed or saved as a PDF (if Adobe Acrobat Pro, or similar solution, is installed), and must be included when submitting a requisition/order to the University or Foundation Purchasing office.

Reviewer Process

Email notification(s)

The IT Purchase Review system will dynamically trigger and send up to a maximum of five separate emails based upon how an end-user completes the survey. Reviewers may receive more than one email (e.g. IT Liaison might receive one email for “Generate Quote” and another for “IT Liaison Review”).

Identifying ITPR emails

Emails sent from the ITPR system will be sent from “ITPSS@mail.fresnostate.edu” <noreply@qemailserver.com> with a subject line which reads “IT Purchase Review (# of ITPR) – Name of Review Type (e.g. IT Liaison Review, Integration & Support).”

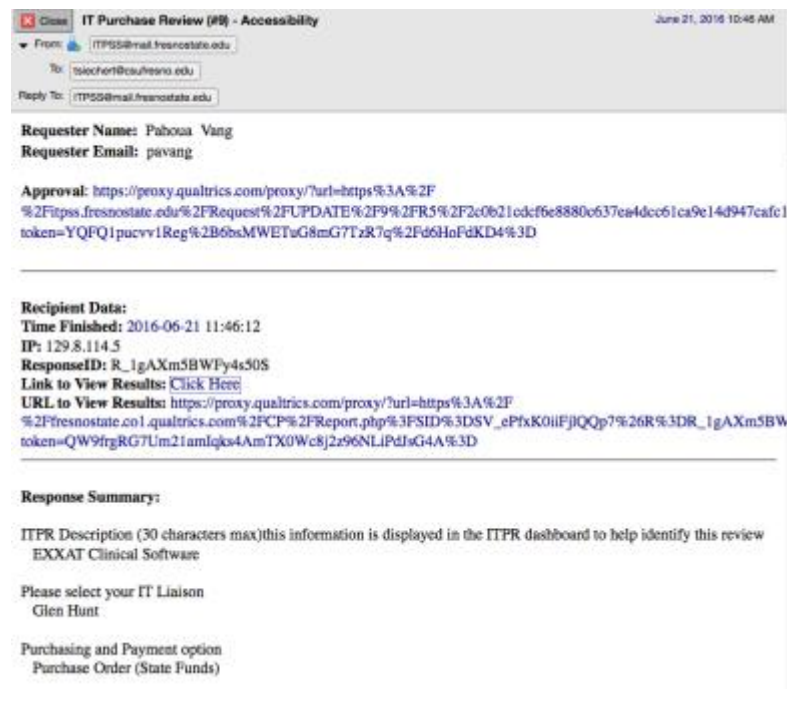
Content of email notification

The body of the email will include a copy of the survey responses inline (see “Response Summary” section), along with links (“Link to View Results”, “URL to View Results”) to view the end-users’ survey responses directly from Qualtrics¹.

Updating task/review status to complete

Once you have completed the task/review, go back to the original email notification and click the URL shown to the right of the words “Approval” (figure 5). Clicking this URL will update the status for that task/review in the ITPR system to “complete.” **PLEASE NOTE:** The system does not currently have the ability to undo this action.

Figure 5 - Sample email notification



¹ The only exception is for the “Generate Quote” task. In this case, the email notification does not include a copy of all survey responses. Instead, the email only includes the end-users’ response about what they need to be quoted.